

Generating Reports in my|CalPERS

Introduction my|CalPERS provides the ability to generate reports. By following a simple procedure, you are able to generate the reports that support many business needs.

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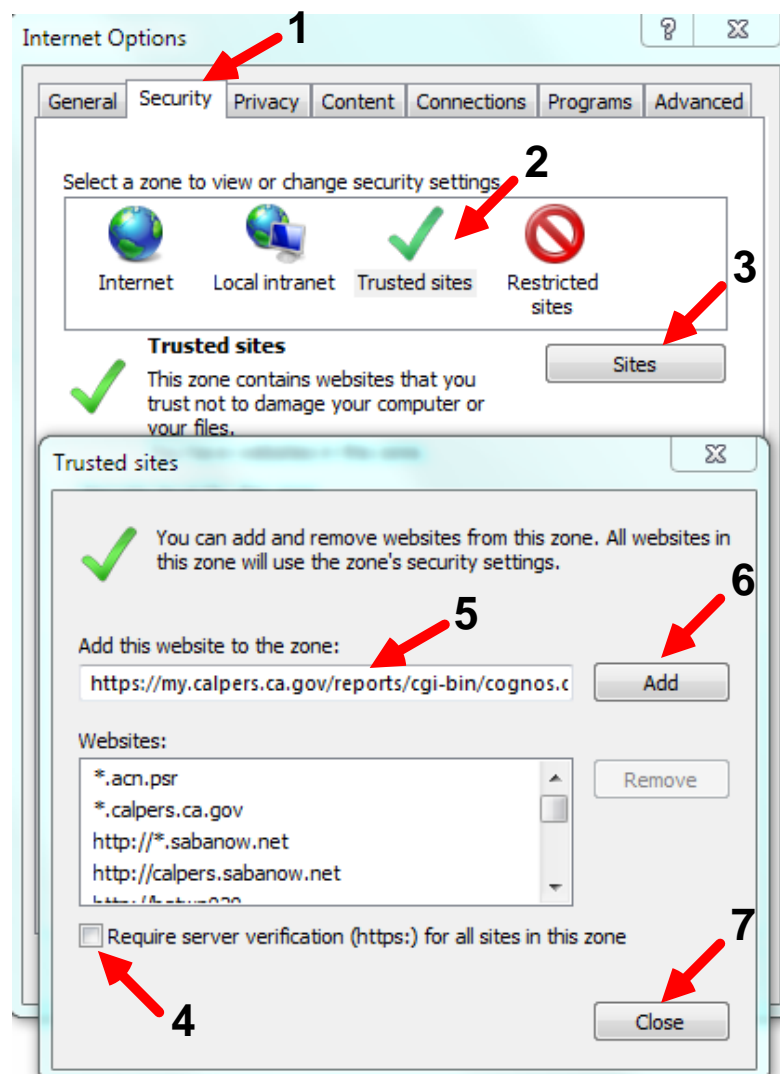
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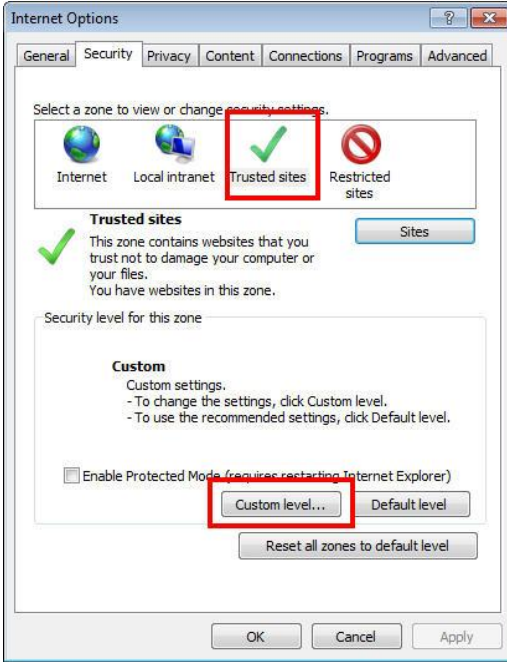
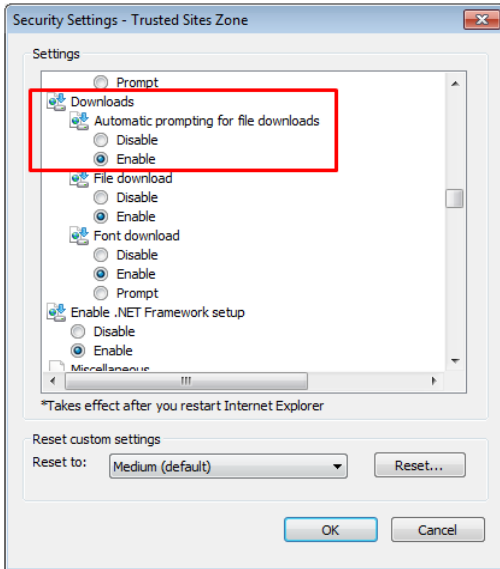
Configuring Your Workstation In order to generate the reports, you will need to ensure that your workstation is configured appropriately to utilize the Cognos reporting software embedded in my|CalPERS.

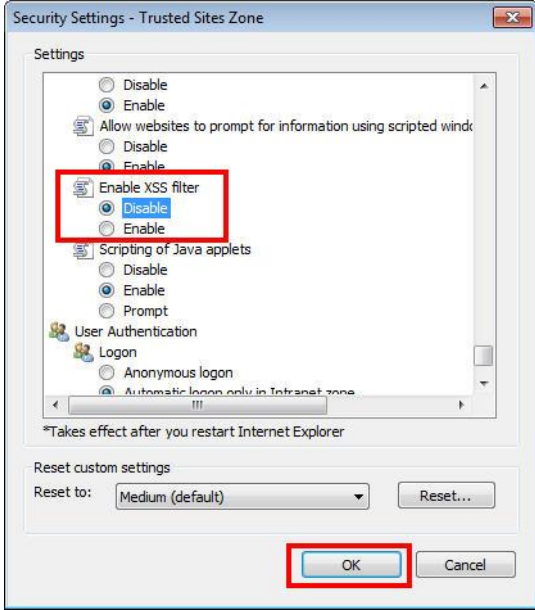
Step	Action
1	Open Internet Explorer. If needed, download the free upgrade to Internet Explorer v8 by selecting this link: http://windows.microsoft.com/en-US/internet-explorer/downloads/ie-8 . [Do not upgrade to Internet Explorer v9.]
2	On the Menu Bar, select Tools and then select Internet Options .

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Step	Action
3	<p>Follow the instructions below to add Cognos as a trusted site.</p> <ol style="list-style-type: none"> 1. Select the Security Tab. 2. Select the Trusted Sites zone. 3. Select the Sites button. 4. Make sure the checkbox “Require server verification (https) for all sites in this zone” is <i>not checked</i>. 5. Enter https://my.calpers.ca.gov/reports/cgi-bin/cognos.cgi to add this website to the zone. 6. Select the Add button. 7. Select the Close button.



Step	Action
4	<p>Follow the instructions below to modify the options of the Trusted Sites zone and set the "Enable XSS Filter" property to "Disable."</p>  <p>Back on the "Internet Options" dialog, with "Trusted Sites" still selected, select the Custom Level button.</p>
5	<p>In the "Security Settings" dialog, scroll down to find the "Downloads – Automatic prompting for file downloads" setting.</p>  <p>Change the setting for "Automatic prompting for file downloads" from "Disable" to "Enable" by selecting the Enable radio button.</p>

Step	Action
6	<p>Continue scrolling down in the “Security Settings” to the ”Enable XSS filter” setting.</p>  <p>Change the setting for ”Enable XSS filter” from ”Enable” to ”Disable” by selecting the Disable radio button, and then select the OK button.</p> <p>When prompted to change settings for this zone, select the Yes button.</p>

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Step	Action
7	<p>Back on the "Internet Options" dialog, select the OK button.</p> 

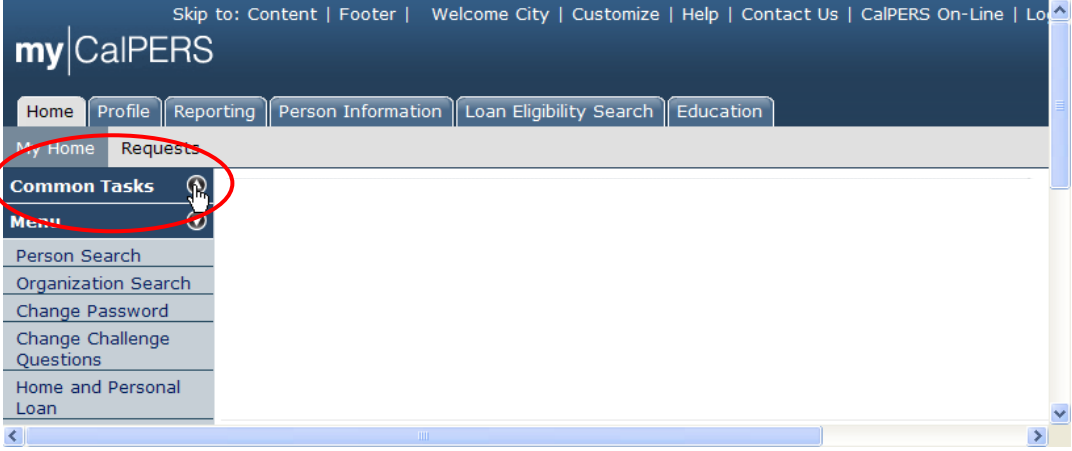
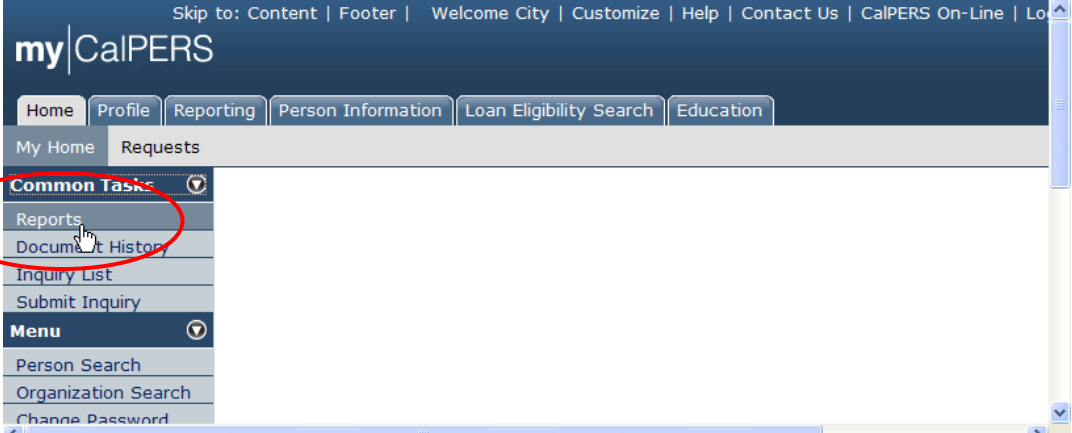
Generating Reports in my|CalPERS, continued

Accessing Reports in Cognos ® my|CalPERS reports are generated through a program called Cognos ®. There are many reports for business partners predefined in Cognos ®. Access to reports is defined by a business contact's system access privileges.

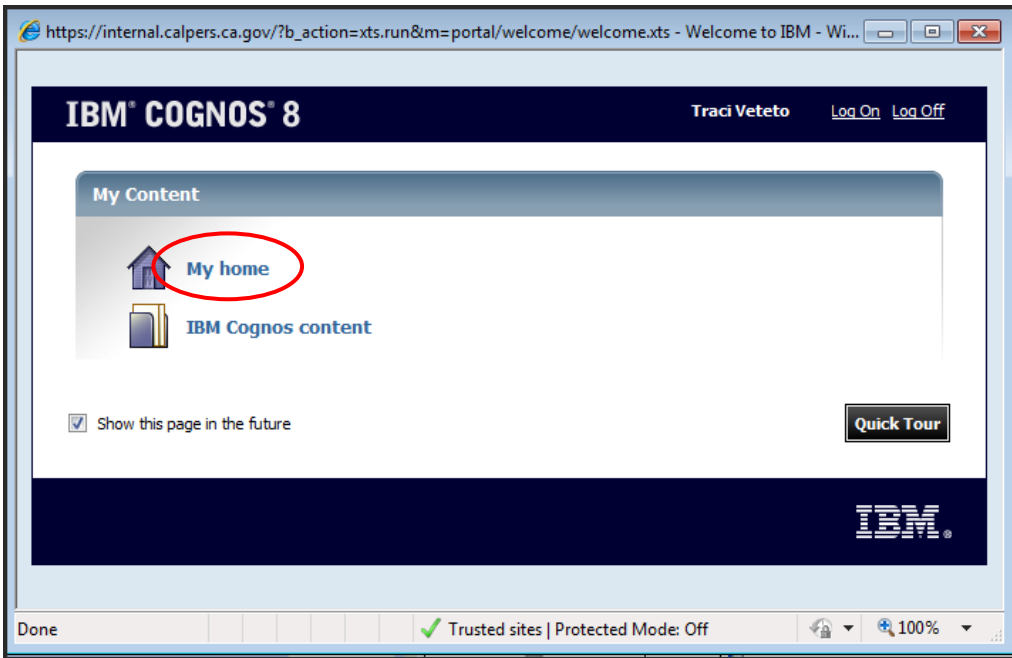
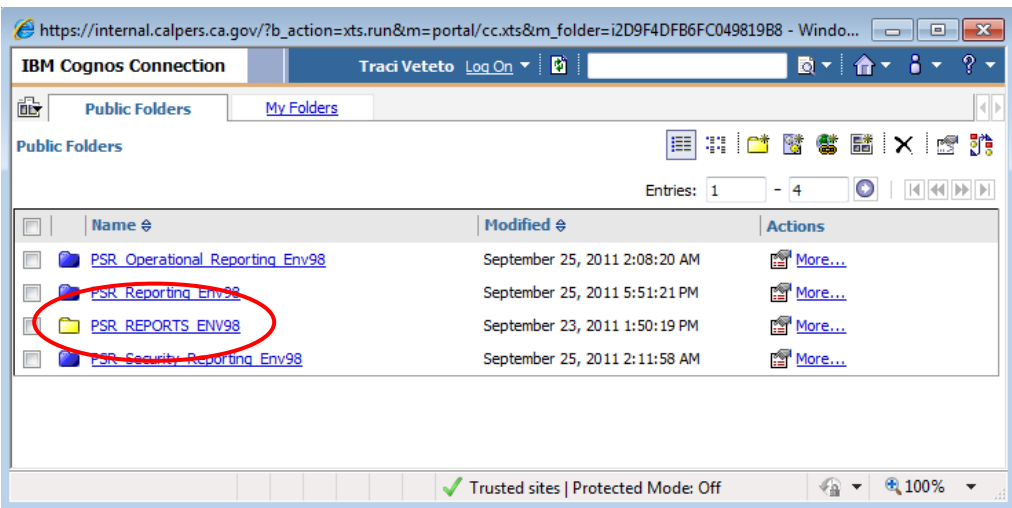
Use the table below to access reports in my|CalPERS.

Step	Action
1	Log in to my CalPERS.
2	From the <i>My Home</i> page select the up arrow to expand Common Tasks from the left navigation menu.

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Step	Action
	
3	<p>Select the Reports link.</p> 
4	<p>After selecting the Reports link, a new window will open, as shown below. Select the My home link.</p>

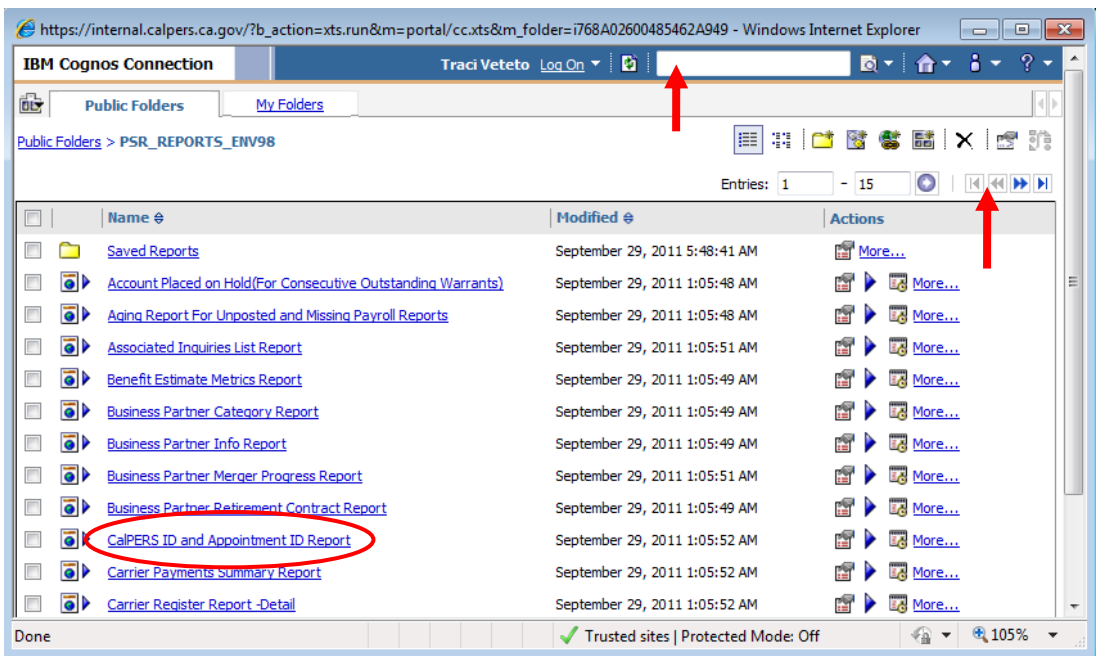
my|CalPERS – Generating Reports

Step	Action															
	 <p>The screenshot shows the IBM Cognos 8 portal interface. The browser address bar displays the URL: https://internal.calpers.ca.gov/?b_action=xts.run&m=portal/welcome/welcome.xts - Welcome to IBM - Wi... The page header includes the IBM COGNOS 8 logo and the user name Traci Veteto, with links for Log On and Log Off. The main content area is titled My Content and contains two items: My home (with a house icon) and IBM Cognos content (with a folder icon). The My home item is circled in red. Below these items is a checkbox labeled Show this page in the future which is checked, and a Quick Tour button. The IBM logo is visible in the bottom right corner of the content area. The browser status bar at the bottom shows Done, Trusted sites Protected Mode: Off, and a zoom level of 100%.</p>															
5	<p>Select and open the PSR_REPORTS_ENV98 folder highlighted in yellow.</p>  <p>The screenshot shows the IBM Cognos Connection interface. The browser address bar displays the URL: https://internal.calpers.ca.gov/?b_action=xts.run&m=portal/cc.xts&m_folder=i2D9F4DFB6FC049819B8 - Windo... The page header includes the IBM Cognos Connection logo and the user name Traci Veteto, with links for Log On and Log Off. The main content area is titled Public Folders and contains a list of folders. The folder PSR_REPORTS_ENV98 is highlighted in yellow. The list of folders is as follows:</p> <table><thead><tr><th>Name</th><th>Modified</th><th>Actions</th></tr></thead><tbody><tr><td>PSR Operational Reporting Env98</td><td>September 25, 2011 2:08:20 AM</td><td>More...</td></tr><tr><td>PSR Reporting Env98</td><td>September 25, 2011 5:51:21 PM</td><td>More...</td></tr><tr><td>PSR_REPORTS_ENV98</td><td>September 23, 2011 1:50:19 PM</td><td>More...</td></tr><tr><td>PSR Security Reporting Env98</td><td>September 25, 2011 2:11:58 AM</td><td>More...</td></tr></tbody></table> <p>The browser status bar at the bottom shows Trusted sites Protected Mode: Off and a zoom level of 100%.</p> <p>This folder contains predefined reports for business partners. The list of available reports is filtered for each business partner based on programs contracted with CalPERS and the system access of the business contact who is logged in.</p>	Name	Modified	Actions	PSR Operational Reporting Env98	September 25, 2011 2:08:20 AM	More...	PSR Reporting Env98	September 25, 2011 5:51:21 PM	More...	PSR_REPORTS_ENV98	September 23, 2011 1:50:19 PM	More...	PSR Security Reporting Env98	September 25, 2011 2:11:58 AM	More...
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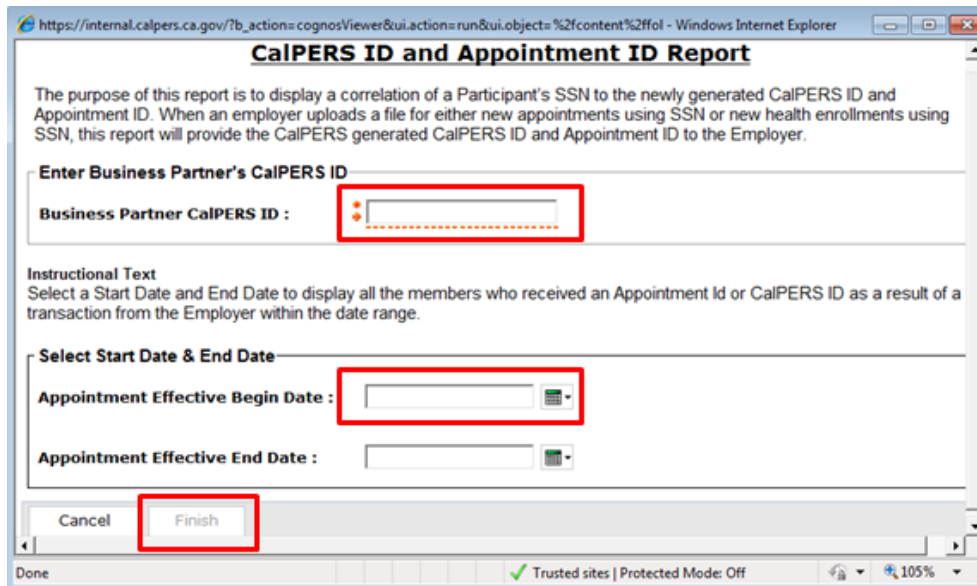
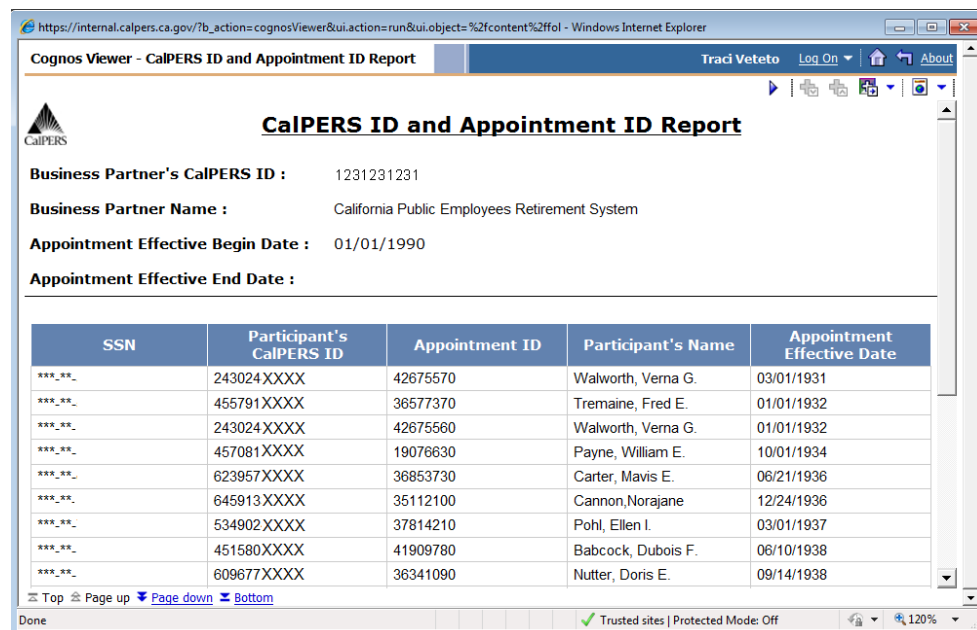
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Generating the CalPERS ID and Appointment ID Report

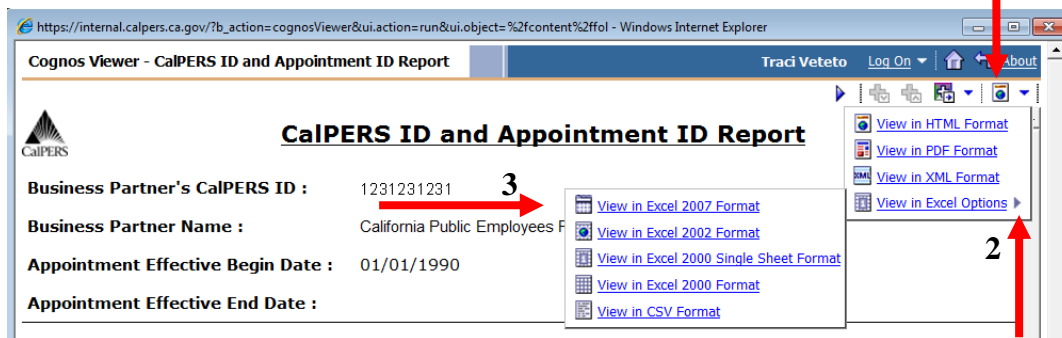
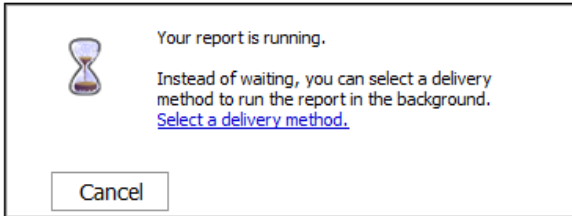
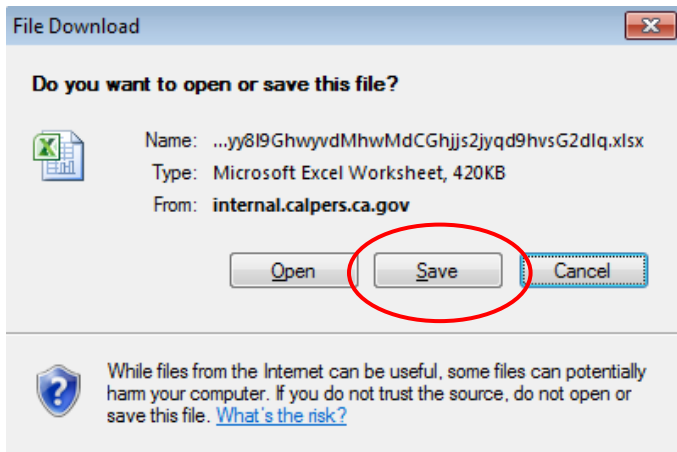
In order to generate the **CalPERS ID and Appointment ID Report**, the business contact must have Retirement Enrollment system access privileges assigned to their login account.

Step	Action
1	Log in to my CalPERS.
2	Follow steps in the Accessing Reports in Cognos section above on pages 5-7.
3	<p>Select the CalPERS ID and Appointment ID Report link.</p> <p>You can use the Search box and the navigation buttons to locate the report.</p>  <p>The screenshot shows the IBM Cognos Connection web interface. The address bar displays the URL: https://internal.calpers.ca.gov/?b_action=xts.run&m=portal/cc.xts&m_folder=i768A02600485462A949. The user is logged in as Traci Veteto. The breadcrumb path is Public Folders > PSR_REPORTS_ENV98. A list of reports is displayed with columns for Name, Modified, and Actions. The report 'CalPERS ID and Appointment ID Report' is circled in red. Two red arrows point to the search bar and the navigation buttons.</p>

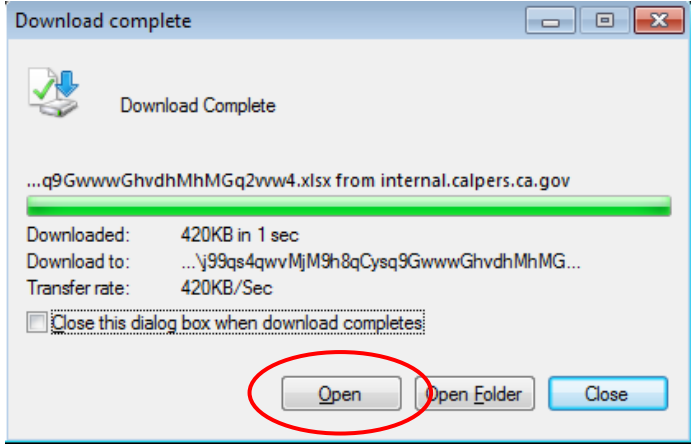
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Step	Action
4	<p>Enter your ten digit Business Partner CalPERS ID and an Appointment Effective Begin Date.</p> <p>Select the Finish button at the bottom of the window to generate the report.</p> <div></div> <p>This report will include information for both active and permanently separated participants who had an active appointment on or after the effective date entered.</p>
5	<p>The report generates displaying the last four digits of each employee's Social Security number, their Participant CalPERS ID, and their appointment information.</p> <div></div>

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Step	Action
6	<p>In the upper right hand corner of the report window, you can select the format for downloading the report by selecting the down arrow next to Report View icon.</p>  <p>You can also select the arrow next to View in Excel Options to see the choices for downloading the report in .xls or .csv format.</p>
7	<p>Once you have selected a format, Cognos will generate the report and the following message will display. You do not need to select the hyperlink in this message. Also, please note that Cognos is not configured to email the report.</p> 
8	<p>When the report has generated, you will be prompted to Open or Save the file. Select the Save button to download the report to your computer or network.</p> 

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Step	Action
9	<p>Select the Open button to view the file once the file has been saved and the following message appears.</p> 

Generating Reports in my|CalPERS, continued

Generating the Contribution Detail Report

The purpose of this report is to provide details on contributions reported by the employer for their employees.

The Contribution Detail Report is listed in Cognos but will display a message directing the business contact to generate this report from within my|CalPERS.

In order to generate the **Contribution Detail Report**, the business contact must have Accounts Payable/Billing and Payroll system access privileges assigned to their login account.

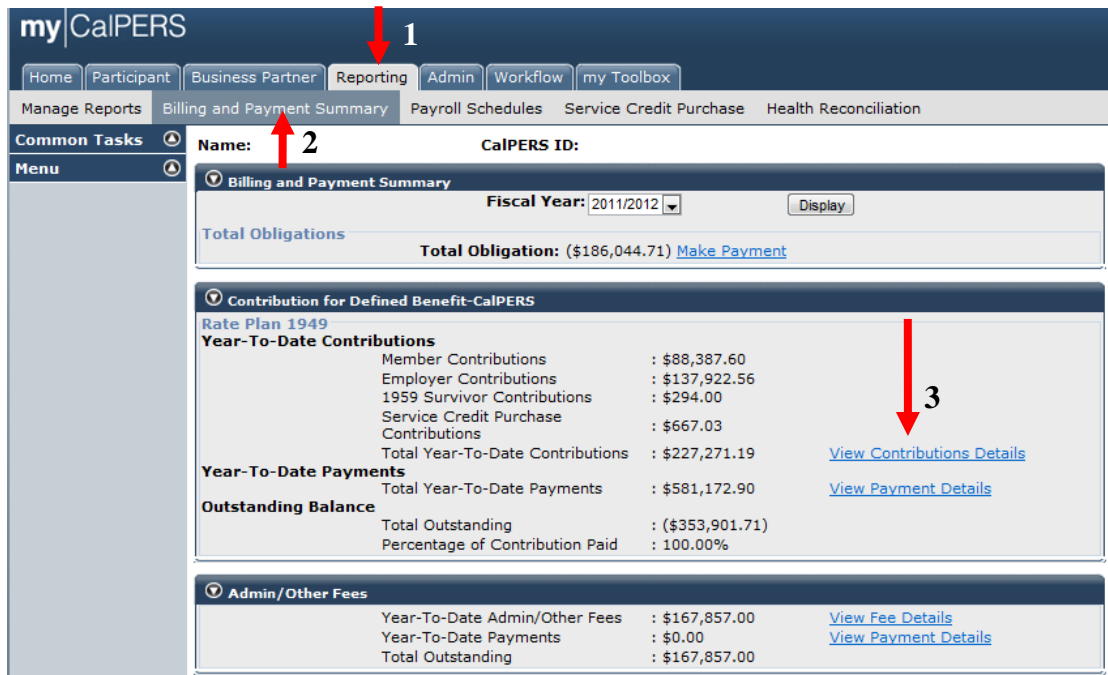
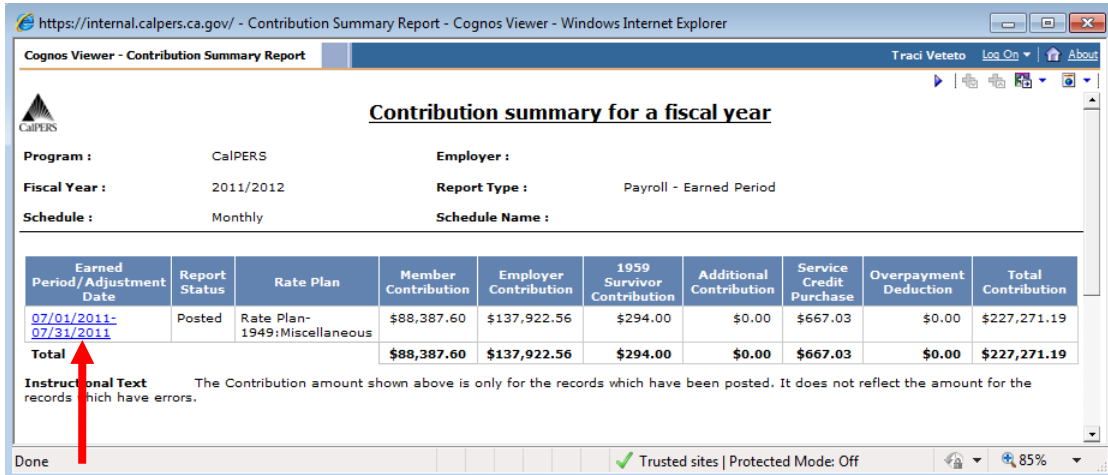
Cognos generates and opens reports in a separate browser window from my|CalPERS. Business partners who report on behalf of other business partners will need to close the Cognos window and end that browser session completely each time they log in and out of my|CalPERS in order to do process transactions for a different business partners. Otherwise, the Cognos window will continue to generate reports as if still logged in for the first business partner.

There are two ways of generating the Contribution Detail Report – through the Billing and Summary pages or through the Manage Reports pages. The steps for generating the report for both are described below.

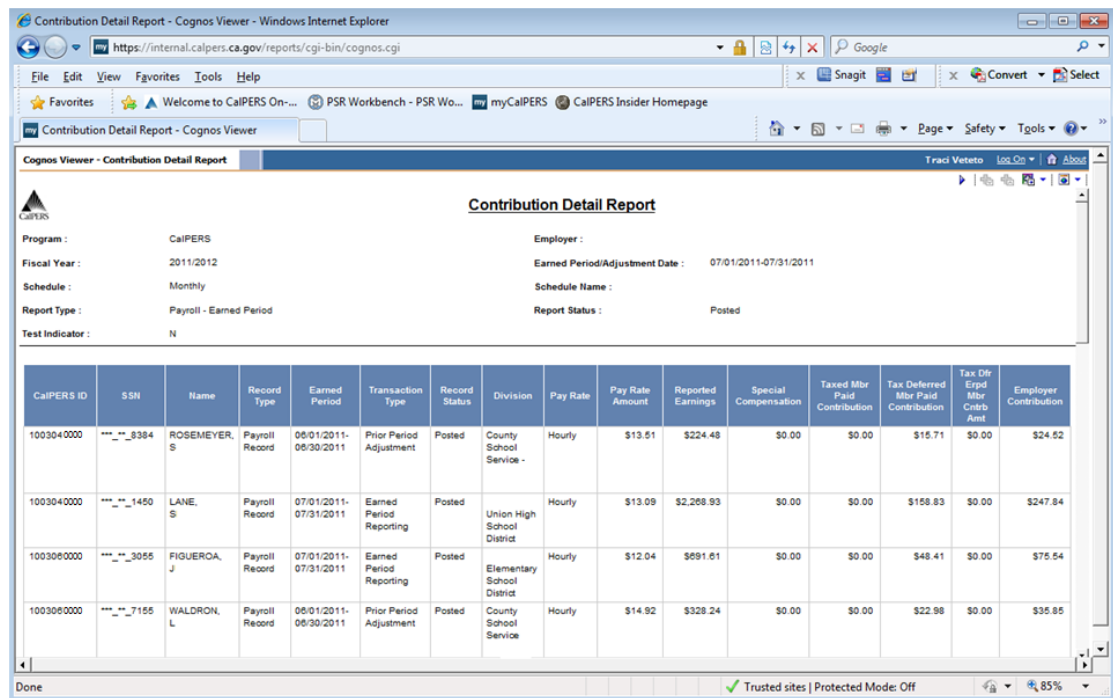
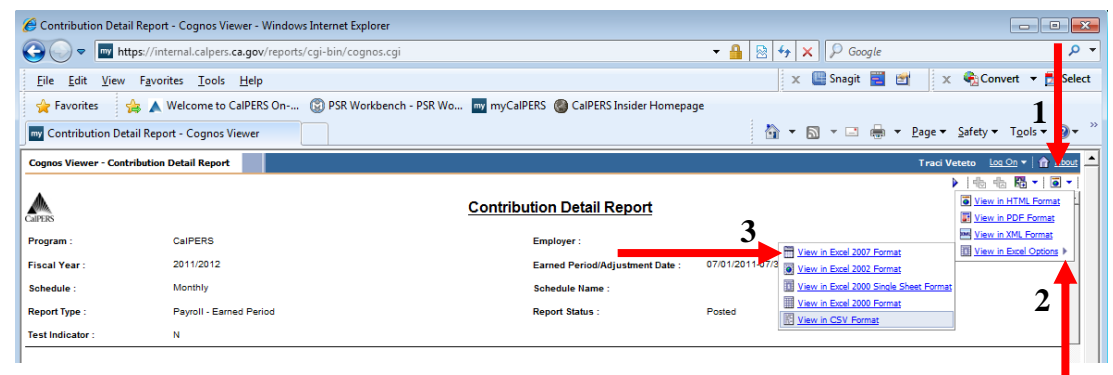
From the Billing and Summary Page

Step	Action
1	Log in to my CalPERS.
2	Follow steps in the Accessing Reports in Cognos section above on pages 5-7.

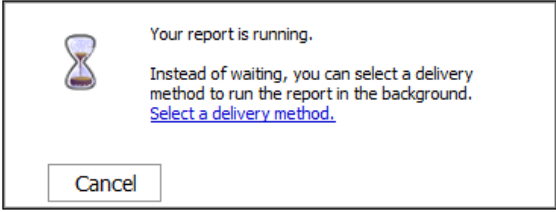
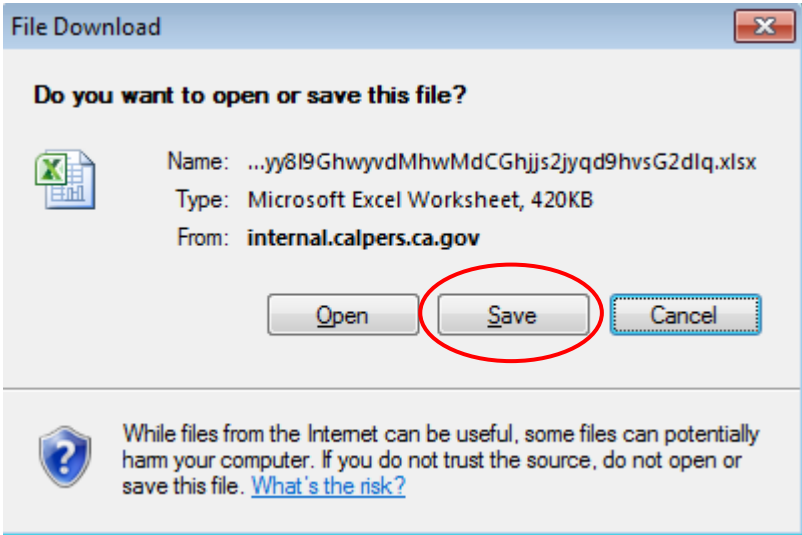


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Step	Action
3	<p>From the Reporting global navigation tab, select the Billing and Payment Summary local navigation link.</p>  <p>In the Contributions for Defined Benefits–CalPERS panel, select the View Contribution Details link.</p>
4	<p>The <i>Contribution Summary for a Fiscal Year</i> report is generated by Cognos and opens in a separate window. It displays information regarding the payroll reports that have posted during the fiscal year.</p> <p>Select the appropriate posted payroll report link to access <i>the Contribution Detail Report</i>.</p> 

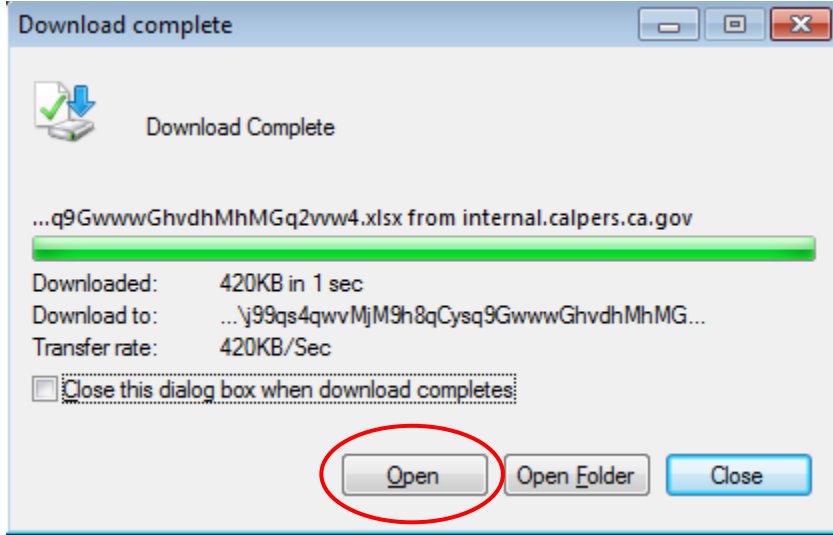
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Step	Action																																																																																
5	<p>The <i>Contribution Detail Report</i> is generated by Cognos and opens in a separate window.</p>  <table><thead><tr><th>CalPERS ID</th><th>SSN</th><th>Name</th><th>Record Type</th><th>Earned Period</th><th>Transaction Type</th><th>Record Status</th><th>Division</th><th>Pay Rate</th><th>Pay Rate Amount</th><th>Reported Earnings</th><th>Special Compensation</th><th>Taxed Mbr Paid Contribution</th><th>Tax Deferred Mbr Paid Contribution</th><th>Tax Dfr Erpd Mbr Contrib Asmt</th><th>Employer Contribution</th></tr></thead><tbody><tr><td>1003040000</td><td>***__8384</td><td>ROSEMEYER, S</td><td>Payroll Record</td><td>06/01/2011-06/30/2011</td><td>Prior Period Adjustment</td><td>Posted</td><td>County School Service -</td><td>Hourly</td><td>\$13.61</td><td>\$224.48</td><td>\$0.00</td><td>\$0.00</td><td>\$15.71</td><td>\$0.00</td><td>\$24.52</td></tr><tr><td>1003040000</td><td>***__1450</td><td>LANE, S</td><td>Payroll Record</td><td>07/01/2011-07/31/2011</td><td>Earned Period Reporting</td><td>Posted</td><td>Union High School District</td><td>Hourly</td><td>\$13.09</td><td>\$2,268.93</td><td>\$0.00</td><td>\$0.00</td><td>\$158.83</td><td>\$0.00</td><td>\$247.84</td></tr><tr><td>1003060000</td><td>***__3055</td><td>FIGUEROA, J</td><td>Payroll Record</td><td>07/01/2011-07/31/2011</td><td>Earned Period Reporting</td><td>Posted</td><td>Elementary School District</td><td>Hourly</td><td>\$12.04</td><td>\$691.61</td><td>\$0.00</td><td>\$0.00</td><td>\$48.41</td><td>\$0.00</td><td>\$75.54</td></tr><tr><td>1003060000</td><td>***__7155</td><td>WALDRON, L</td><td>Payroll Record</td><td>06/01/2011-06/30/2011</td><td>Prior Period Adjustment</td><td>Posted</td><td>County School Service</td><td>Hourly</td><td>\$14.92</td><td>\$328.24</td><td>\$0.00</td><td>\$0.00</td><td>\$22.98</td><td>\$0.00</td><td>\$35.85</td></tr></tbody></table>	CalPERS ID	SSN	Name	Record Type	Earned Period	Transaction Type	Record Status	Division	Pay Rate	Pay Rate Amount	Reported Earnings	Special Compensation	Taxed Mbr Paid Contribution	Tax Deferred Mbr Paid Contribution	Tax Dfr Erpd Mbr Contrib Asmt	Employer Contribution	1003040000	***__8384	ROSEMEYER, S	Payroll Record	06/01/2011-06/30/2011	Prior Period Adjustment	Posted	County School Service -	Hourly	\$13.61	\$224.48	\$0.00	\$0.00	\$15.71	\$0.00	\$24.52	1003040000	***__1450	LANE, S	Payroll Record	07/01/2011-07/31/2011	Earned Period Reporting	Posted	Union High School District	Hourly	\$13.09	\$2,268.93	\$0.00	\$0.00	\$158.83	\$0.00	\$247.84	1003060000	***__3055	FIGUEROA, J	Payroll Record	07/01/2011-07/31/2011	Earned Period Reporting	Posted	Elementary School District	Hourly	\$12.04	\$691.61	\$0.00	\$0.00	\$48.41	\$0.00	\$75.54	1003060000	***__7155	WALDRON, L	Payroll Record	06/01/2011-06/30/2011	Prior Period Adjustment	Posted	County School Service	Hourly	\$14.92	\$328.24	\$0.00	\$0.00	\$22.98	\$0.00	\$35.85
CalPERS ID	SSN	Name	Record Type	Earned Period	Transaction Type	Record Status	Division	Pay Rate	Pay Rate Amount	Reported Earnings	Special Compensation	Taxed Mbr Paid Contribution	Tax Deferred Mbr Paid Contribution	Tax Dfr Erpd Mbr Contrib Asmt	Employer Contribution																																																																		
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Step	Action
7	<p>Once you have selected a format, Cognos will generate the report and the following message will display. You do not need to select the hyperlink in this message. Also, please note that Cognos is not configured to email the report.</p> <div data-bbox="602 401 1154 611">  <p>Your report is running.</p> <p>Instead of waiting, you can select a delivery method to run the report in the background. Select a delivery method.</p> <p>Cancel</p> </div>
8	<p>When the report has generated, you will be prompted to Open or Save the file. Select the Save button to download the report to your computer or network.</p> <div data-bbox="477 779 1273 1310">  <p>File Download</p> <p>Do you want to open or save this file?</p> <p> Name: ...yy8I9GhwyvdMhwMdCGhjjs2jyqd9hvsG2dlq.xlsx Type: Microsoft Excel Worksheet, 420KB From: internal.calpers.ca.gov</p> <p>Open Save Cancel</p> <p> While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?</p> </div>

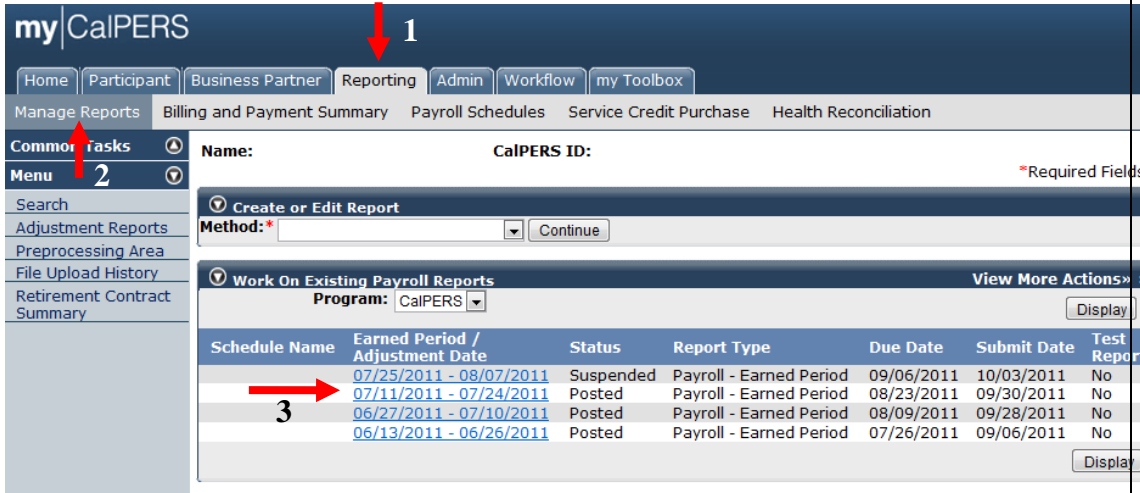
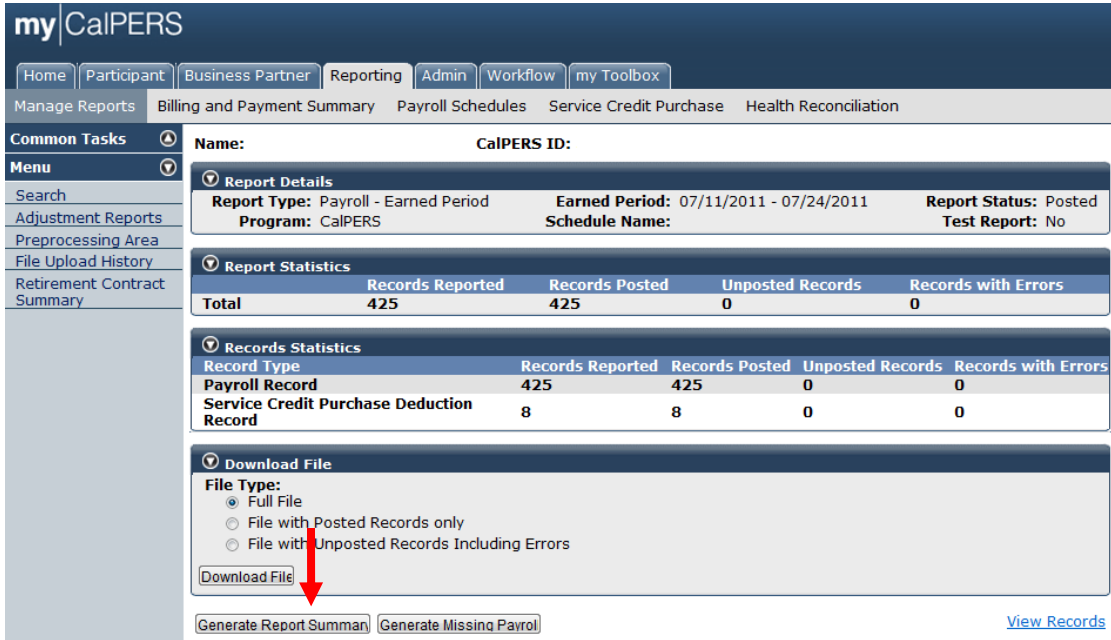
my|CalPERS – Generating Reports

Step	Action
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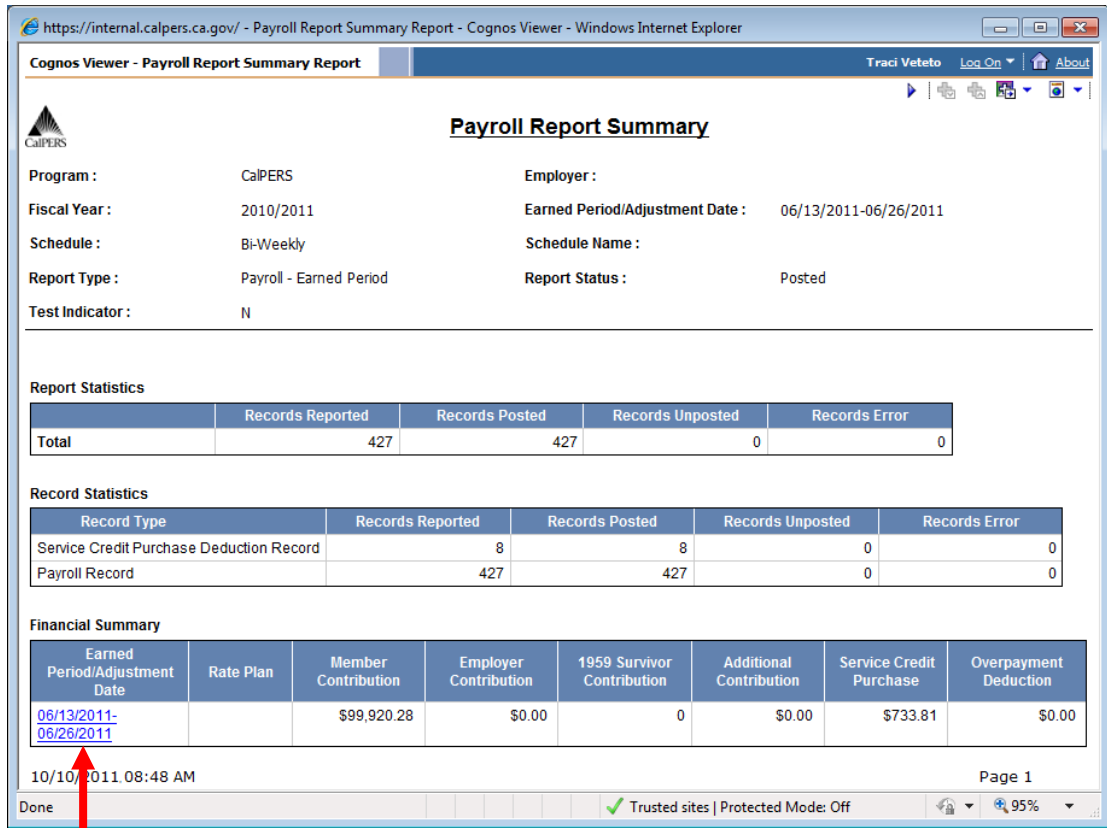
From the Manage Reports Page

Step	Action
1	Log in to my CalPERS.
2	Follow steps in the Accessing Reports in Cognos section above on pages 5-7.

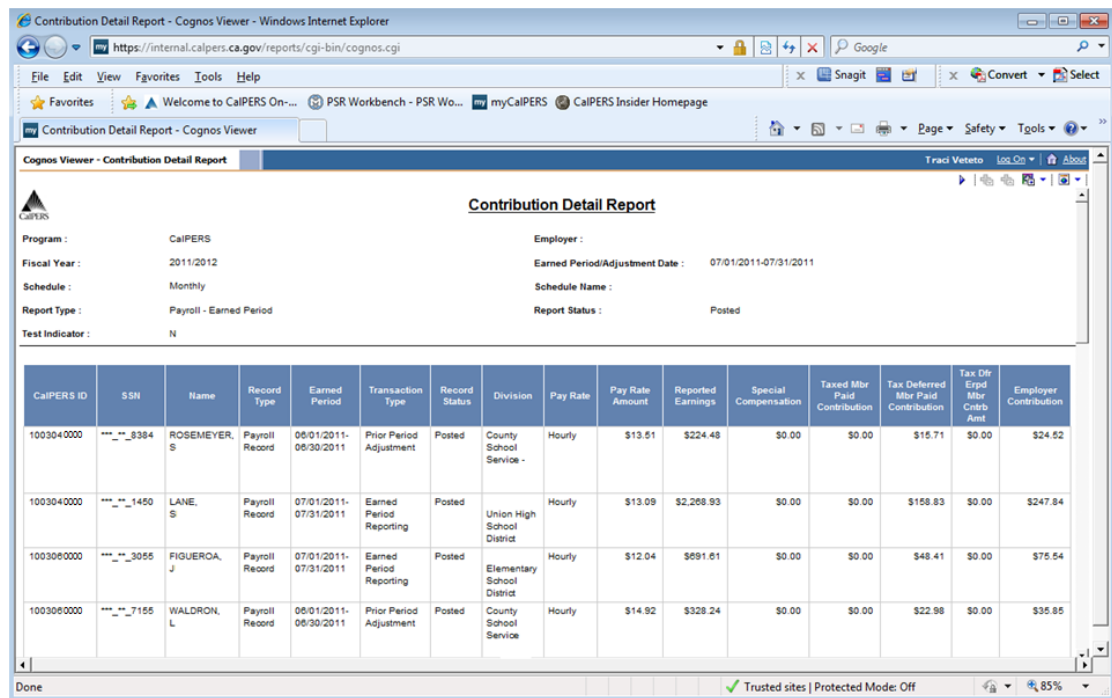
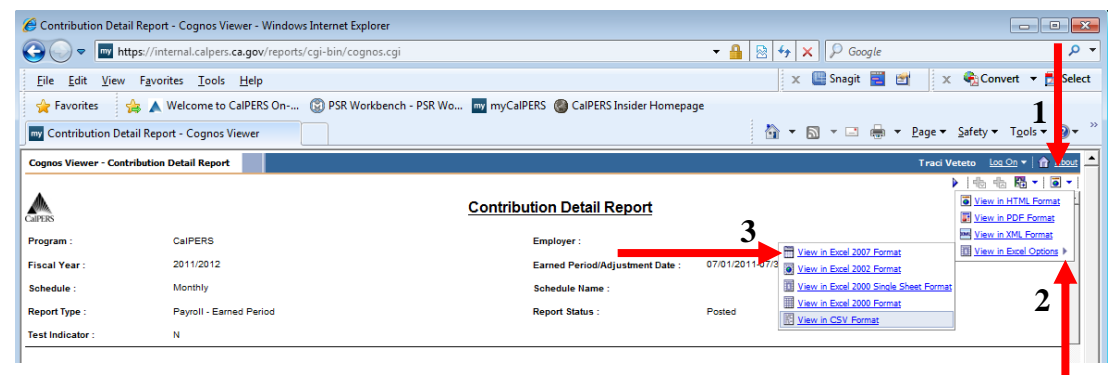
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Step	Action
3	<p>From the Reporting global navigation tab, select the Manage Reports local navigation link.</p>  <p>In the Work on Existing Payroll Reports panel, select a Payroll Report link.</p>
4	<p>At the bottom of the Report Details, select the Generate Report Summary link.</p> 

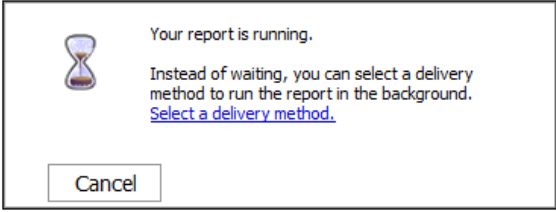
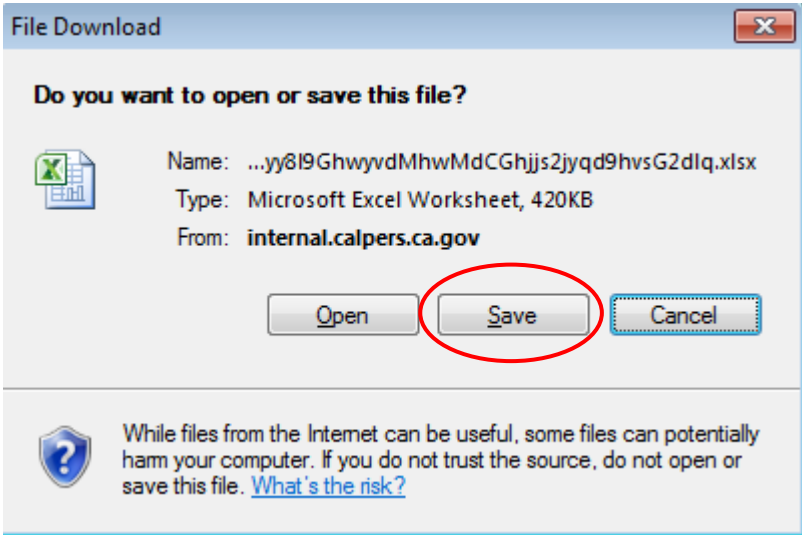


my|CalPERS – Generating Reports

Step	Action																																											
5	<p>The <i>Payroll Report Summary</i> report is generated by Cognos and opens in a separate window. It displays report and record statistics related to the payroll report selected. Select the payroll report link in the Financial Summary table to access the <i>Contribution Detail Report</i>.</p>  <p>The screenshot displays the "Cognos Viewer - Payroll Report Summary Report" interface. At the top, it shows the URL "https://internal.calpers.ca.gov/" and the user "Traci Veteto". The report title is "Payroll Report Summary". Below this, key information is listed: Program (CalPERS), Fiscal Year (2010/2011), Schedule (Bi-Weekly), Report Type (Payroll - Earned Period), and Test Indicator (N). The Earned Period/Adjustment Date is 06/13/2011-06/26/2011, and the Report Status is Posted. The report is divided into three main sections: Report Statistics, Record Statistics, and Financial Summary. The Report Statistics table shows 427 Records Reported, 427 Records Posted, 0 Records Unposted, and 0 Records Error. The Record Statistics table shows 8 Service Credit Purchase Deduction Records and 427 Payroll Records. The Financial Summary table lists various contribution and deduction amounts. A red arrow points to the link "06/13/2011-06/26/2011" in the Financial Summary table, which is used to access the Contribution Detail Report.</p> <table><tr><th>Report Statistics</th><th>Records Reported</th><th>Records Posted</th><th>Records Unposted</th><th>Records Error</th></tr><tr><td>Total</td><td>427</td><td>427</td><td>0</td><td>0</td></tr></table> <table><tr><th>Record Statistics</th><th>Records Reported</th><th>Records Posted</th><th>Records Unposted</th><th>Records Error</th></tr><tr><td>Service Credit Purchase Deduction Record</td><td>8</td><td>8</td><td>0</td><td>0</td></tr><tr><td>Payroll Record</td><td>427</td><td>427</td><td>0</td><td>0</td></tr></table> <table><tr><th>Financial Summary</th><th>Earned Period/Adjustment Date</th><th>Rate Plan</th><th>Member Contribution</th><th>Employer Contribution</th><th>1959 Survivor Contribution</th><th>Additional Contribution</th><th>Service Credit Purchase</th><th>Overpayment Deduction</th></tr><tr><td></td><td>06/13/2011-06/26/2011</td><td></td><td>\$99,920.28</td><td>\$0.00</td><td>0</td><td>\$0.00</td><td>\$733.81</td><td>\$0.00</td></tr></table> <p>10/10/2011 08:48 AM Page 1</p> <p>Done Trusted sites Protected Mode: Off 95%</p>	Report Statistics	Records Reported	Records Posted	Records Unposted	Records Error	Total	427	427	0	0	Record Statistics	Records Reported	Records Posted	Records Unposted	Records Error	Service Credit Purchase Deduction Record	8	8	0	0	Payroll Record	427	427	0	0	Financial Summary	Earned Period/Adjustment Date	Rate Plan	Member Contribution	Employer Contribution	1959 Survivor Contribution	Additional Contribution	Service Credit Purchase	Overpayment Deduction		06/13/2011-06/26/2011		\$99,920.28	\$0.00	0	\$0.00	\$733.81	\$0.00
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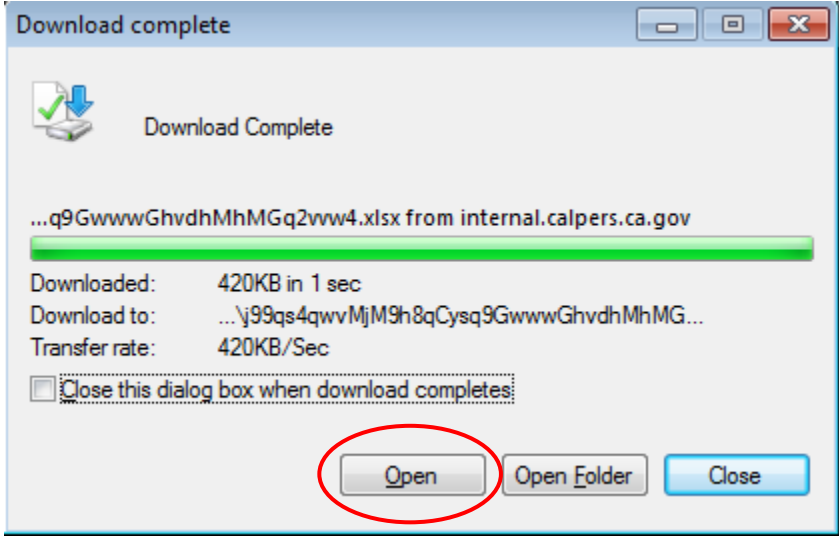
myCalPERS – Generating Reports

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5	<p>The <i>Contribution Detail Report</i> is generated by Cognos and opens in a separate window.</p>  <table><thead><tr><th>CalPERS ID</th><th>SSN</th><th>Name</th><th>Record Type</th><th>Earned Period</th><th>Transaction Type</th><th>Record Status</th><th>Division</th><th>Pay Rate</th><th>Pay Rate Amount</th><th>Reported Earnings</th><th>Special Compensation</th><th>Taxed Mbr Paid Contribution</th><th>Tax Deferred Mbr Paid Contribution</th><th>Tax Dfr Erpd Mbr Contrib Asmt</th><th>Employer Contribution</th></tr></thead><tbody><tr><td>1003040000</td><td>***__8384</td><td>ROSEMEYER, S</td><td>Payroll Record</td><td>06/01/2011-06/30/2011</td><td>Prior Period Adjustment</td><td>Posted</td><td>County School Service -</td><td>Hourly</td><td>\$13.61</td><td>\$224.48</td><td>\$0.00</td><td>\$0.00</td><td>\$15.71</td><td>\$0.00</td><td>\$24.52</td></tr><tr><td>1003040000</td><td>***__1450</td><td>LANE, S</td><td>Payroll Record</td><td>07/01/2011-07/31/2011</td><td>Earned Period Reporting</td><td>Posted</td><td>Union High School District</td><td>Hourly</td><td>\$13.09</td><td>\$2,268.93</td><td>\$0.00</td><td>\$0.00</td><td>\$158.83</td><td>\$0.00</td><td>\$247.84</td></tr><tr><td>1003060000</td><td>***__3055</td><td>FIGUEROA, J</td><td>Payroll Record</td><td>07/01/2011-07/31/2011</td><td>Earned Period Reporting</td><td>Posted</td><td>Elementary School District</td><td>Hourly</td><td>\$12.04</td><td>\$691.61</td><td>\$0.00</td><td>\$0.00</td><td>\$48.41</td><td>\$0.00</td><td>\$75.54</td></tr><tr><td>1003060000</td><td>***__7155</td><td>WALDRON, L</td><td>Payroll Record</td><td>06/01/2011-06/30/2011</td><td>Prior Period Adjustment</td><td>Posted</td><td>County School Service</td><td>Hourly</td><td>\$14.92</td><td>\$328.24</td><td>\$0.00</td><td>\$0.00</td><td>\$22.98</td><td>\$0.00</td><td>\$35.85</td></tr></tbody></table>	CalPERS ID	SSN	Name	Record Type	Earned Period	Transaction Type	Record Status	Division	Pay Rate	Pay Rate Amount	Reported Earnings	Special Compensation	Taxed Mbr Paid Contribution	Tax Deferred Mbr Paid Contribution	Tax Dfr Erpd Mbr Contrib Asmt	Employer Contribution	1003040000	***__8384	ROSEMEYER, S	Payroll Record	06/01/2011-06/30/2011	Prior Period Adjustment	Posted	County School Service -	Hourly	\$13.61	\$224.48	\$0.00	\$0.00	\$15.71	\$0.00	\$24.52	1003040000	***__1450	LANE, S	Payroll Record	07/01/2011-07/31/2011	Earned Period Reporting	Posted	Union High School District	Hourly	\$13.09	\$2,268.93	\$0.00	\$0.00	\$158.83	\$0.00	\$247.84	1003060000	***__3055	FIGUEROA, J	Payroll Record	07/01/2011-07/31/2011	Earned Period Reporting	Posted	Elementary School District	Hourly	\$12.04	\$691.61	\$0.00	\$0.00	\$48.41	\$0.00	\$75.54	1003060000	***__7155	WALDRON, L	Payroll Record	06/01/2011-06/30/2011	Prior Period Adjustment	Posted	County School Service	Hourly	\$14.92	\$328.24	\$0.00	\$0.00	\$22.98	\$0.00	\$35.85
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6	<p>In the upper right hand corner of the report window, you can select the format for downloading the report by selecting the down arrow next to Report View icon.</p>  <p>You can also select the arrow next to View in Excel Options to see the choices for downloading the report in .xls or .csv format.</p>																																																																																

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7	<p>Once you have selected a format, Cognos will generate the report and the following message will display. You do not need to select the hyperlink in this message. Also, please note that Cognos is not configured to email the report.</p> <div data-bbox="602 401 1154 611">  <p>Your report is running.</p> <p>Instead of waiting, you can select a delivery method to run the report in the background. Select a delivery method.</p> <p>Cancel</p> </div>
8	<p>When the report has generated, you will be prompted to Open or Save the file. Select the Save button to download the report to your computer or network.</p> <div data-bbox="477 779 1273 1310">  <p>File Download</p> <p>Do you want to open or save this file?</p> <p> Name: ...yy8I9GhwyvdMhwMdCGhjs2jyqd9hvsG2dlq.xlsx Type: Microsoft Excel Worksheet, 420KB From: internal.calpers.ca.gov</p> <p>Open Save Cancel</p> <p> While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?</p> </div>

my|CalPERS – Generating Reports

Step	Action
9	<p>Select the Open button to view the file once the file has been saved and the following message appears.</p> 

Generating Reports in my|CalPERS, continued

List of my|CalPERS Reports

The following table lists some of the reports with a short description that employers can generate in my|CalPERS.

Report	Description
Contribution Detail Report	Provide details of contributions reported by the employer for a specific report type and earned period.
Remittance Advice Report	Allows an employer to generate a remittance summary to accompany payments.
Payroll Report Summary	Displays payroll report statistics and financial information. Also provides a summary of all records reported, records posted, un-posted records, and records found with errors.
Monthly Employer Billing Roster Report	Shows the employer all their employees and their employees' dependents which make up their Current Month Receivable.
Participant Enrollment History Report	Lists the history of enrollment/appointment data for the CalPERS program only.
Contribution Summary For a Fiscal Year Report	Provides summary information on the contributions reported in the payroll report or calculated by the system for a given earned period within a fiscal year.
Employer Health Event Notification Report	Summarizes the confirmed transactions submitted by the Public Agency/School Districts for a Particular Active Employer.
CalPERS ID and Appointment ID Report	Displays a correlation of a Participant's SSN to the newly generated CalPERS ID and Appointment ID.
Health Plan Statements Employer Report	Displays summarized Health Plan Statement information for subscribers under a particular employer.
Retirement Planning for Public Agencies and Schools Report	Provides employers with retirement planning information based on members' age group and member category under Public Agency/School Member Category Benefits rule group.
Service Credit Purchase Payments Due Report	Provides a list of members that have active Service Credit Purchase payment plans along with the scheduled payment end date.
Error List Report	Lists all the payroll records that have errors.
Missing Participant Payroll Records	Lists missing payroll, service credit purchase, supplemental income plan records and overpayment deductions in a regular earned period report.

Employer Reports – Access by User Role

Report Name	my CalPERS Roles										
	Business Partner AP/Billing	Business Partner Direct Authorization	Business Partner Employer Inquiry	Business Partner Employer Maintenance	Business Partner Health Contracts	Business Partner Health Enrollment	Business Partner PA Billing	Business Partner Payroll	Business Partner Retirement Contracts	Business Partner Retirement Enrollment	Business Partner SCP Certification
Aging Report For Unposted and Missing Payroll Reports								Y			
Business Partner Health Contract Report					Y						
Business Partner Info Report						Y				Y	
Business Partner Retirement Contract Report									Y		
CalPERS ID and Appointment ID Report										Y	
CalPERS ID and SSN Report		Y									
COBRA Health Premiums for Contracting Agencies Report					Y						
COBRA Health Premiums for State Agencies Report					Y						
Contract Detail Report								Y	Y	Y	
Contribution Detail Report	Y							Y			
Contribution Summary Report	Y							Y			
Deduction File Report		Y									
Deduction Register Report		Y									
Dental Memo Report		Y									
Employer Annual Member Statement Report								Y			
Employer Health Event Notification Report			Y			Y					
Employer Retroactive Health Adjustment Report			Y								
Error List Report								Y			
Fees Assessed-Waived During a Period								Y			
Health Plan Statement Employer Report			Y								
Health Premiums for Contracting Agencies Report					Y						
Health Premiums for State Agencies Report					Y						
Missing Participant Payroll Records Report								Y			
Monthly Employer Billing Roster Report			Y				Y				

Report Name	my CalPERS Roles										
	Business Partner AP/Billing	Business Partner Direct Authorization	Business Partner Employer Inquiry	Business Partner Employer Maintenance	Business Partner Health Contracts	Business Partner Health Enrollment	Business Partner PA Billing	Business Partner Payroll	Business Partner Retirement Contracts	Business Partner Retirement Enrollment	Business Partner SCP Certification
Participant Enrollment History Report										Y	
Payroll Exception Report								Y			
Payroll Report Summary Report								Y			
Present Employer Statement Report								Y			
Provision Detail Report				Y							
Receivables and Payment Info Report	Y										
Remittance Advice Report	Y						Y	Y			
Reported Member Summary Report	Y							Y			
Reported Member-Detail Report	Y							Y			
Retirement Planning for PAS Report									Y		
SCP Payments Due Report											Y
Service Credit Payment Scheduled Changes			Y								
Statutory Program Event Report				Y							